



Software Help Sheet 28:

Termination and Deactivation of Consumers

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Background

Providers requested clarification as to when to deactivate a consumer and when to terminate the care enrollment and related components.

Ending Services or Consumers

This help sheet is prepared in four parts.

Part I – Deactivating a Consumer on the SAMS Assessment

Part II – Terminating a Care Enrollment

Part III – Inactivating a Provider, Fund Identifier and Care Recipient/Caregiver

Part IV – Inactivating a Consumer

Part I must be completed for every consumer that is being deactivated. Parts II and III are to be completed only when both of the following requirements are met: 1) more than one active provider is present and 2) at least one provider will remain active. It is **imperative** that providers end only components directly related to their own service(s). Part IV is to be completed only when either one provider exists, or all existing providers have been made inactive.

If a consumer is receiving services from more than one provider and the consumer's status is changed to inactive, other providers are prevented from delivering ongoing services. Providers also need to invoice the services prior to deactivating the consumer. **Therefore, these instructions must be carefully followed.**

Below is a sample Summary view of multiple active providers highlighted in red. If your consumer has two or more active providers such as this example, you would only complete Part I, II and III.

Contents

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

Call History

AAAAging, TestGiver (1394034975) H. (310) 333-4444 **11111 14th St #1 Santa Monica, CA**
Los Angeles County AAA Primary Care Manager: CM 10

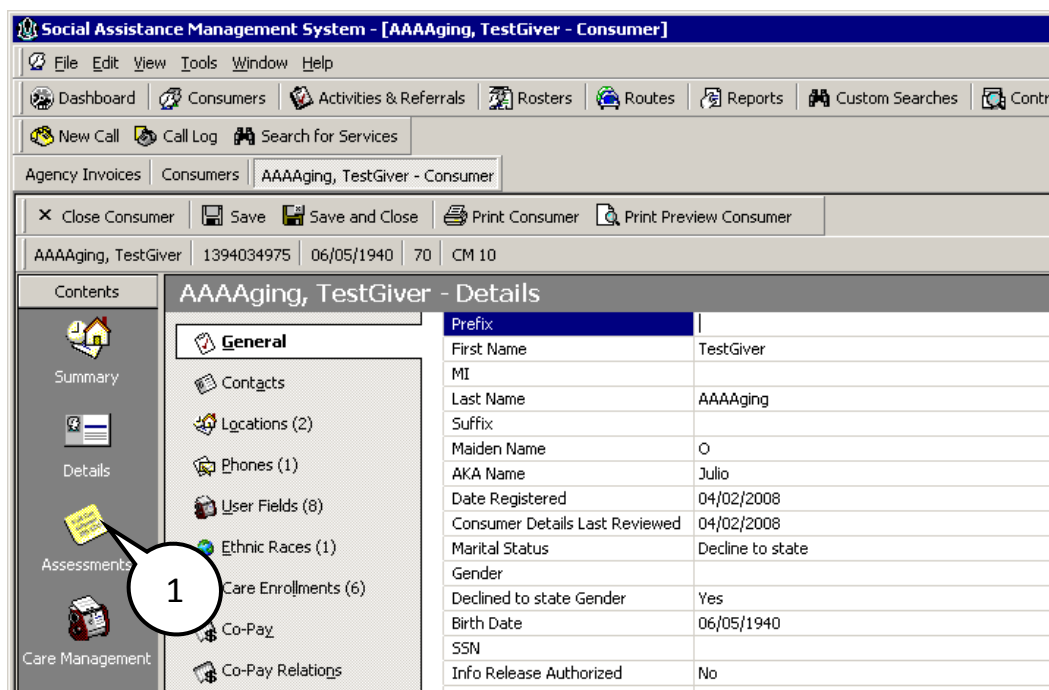
(Edit Notes)

Personal	Characteristics	Insurance
Social Sec. No.	Language English	Medicaid #
Date of Birth 06/05/1940	Homebound No	Medicaid Policy#
Age 70	Frail No	Medicare #
Reason: Not Indicated	Disabled No	Medical Assistance ID
Status: Inactive	Is Abused/ Neglected/ Exploited No	
Status Date: 04/04/2011		
AKA Name Julio	NAPIS	User Fields (Add New)
Info Release? No	Ethnicity Unknown	Declined to state Ethnicity Yes (Edit)
Date Registered 04/02/2008	Is In Poverty Don't Know	Declined to state Gender Yes (Edit)
Details Last Reviewed 04/02/2008	Lives Alone Don't Know	Declined to state living arran Yes (Edit)
Marital Status Domestic Partner	High Nutritional Risk Yes	Declined to state Nutritional Yes (Edit)
Gender Male	Is Rural No	Declined to state Poverty Yes (Edit)
County Los Angeles	Number of ADLs 6	Former ADHC recipient? No (Edit)
Municipality Not Indicated	Number of IADLs 8	Former IHSS Recipient? No (Edit)
Primary Phone Number (310) 333-4444		Supervisory District? 0 (Edit)
	Current Providers (Add New)	Routes (Add New)
	Southeast Area Social Services Funding Authority (07/01/2008 - None) (Edit)	Current Care Recipients (Add New)
	WISE and Healthy Aging (04/01/2008 - None) (Edit)	AAAAging, Jose Jose Luis D (1393589418) (Relationship to Recipient: Non-Relative) 04/02/2008 - None (Edit)
	Current Care Enrollments (Add New)	Aaaaa, Zapata W (1308014643) (Relationship to Recipient: Non-Relative) (Edit)
	Family Caregiver Support Program (Active) 07/01/2010 - None (Edit)	
	III-B Supportive Services (Edit)	

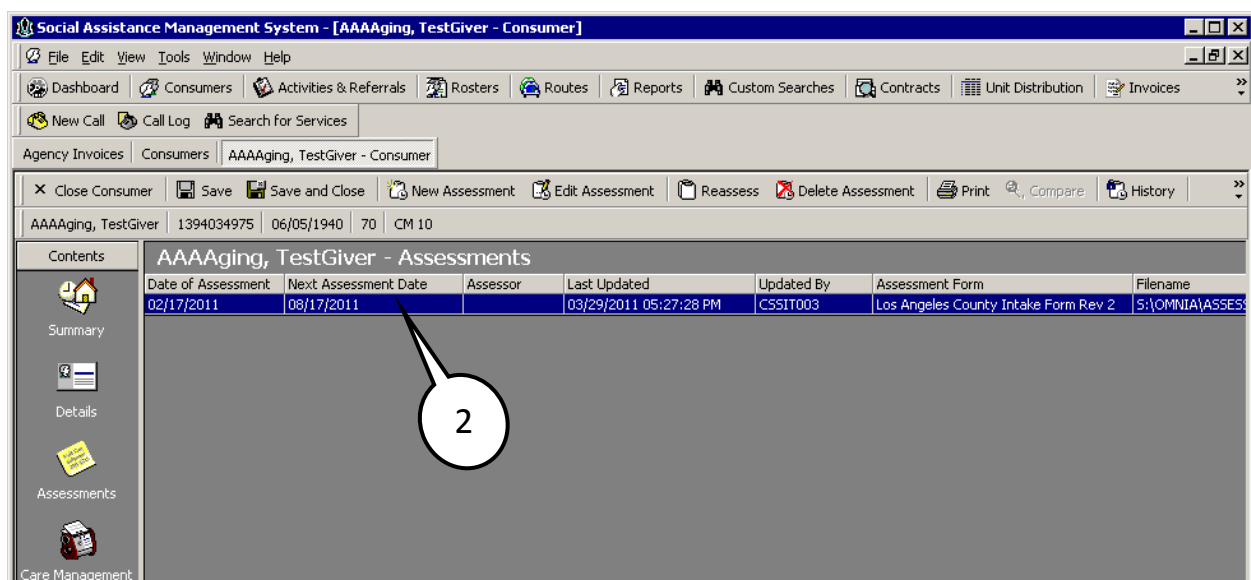
Part I – Deactivating a consumer on the SAMS Assessment

When either deactivating a consumer or terminating a care enrollment, every provider must update the SAMS assessment section titled Reasons for Deactivation.

1. While viewing a consumer's information on the Details or Summary screen, **Click** on the **Assessment** button located within the Content Menu options.



2. Once the Assessments screen is displayed, **double Click** on the appropriate **Assessment** to open it (see note at end of page 3).



3. Once the Assessment is opened, **Click on Reason for Deactivation.**
4. **Change the Yes** answer to **No**, as Deactivation is now applicable.
5. **Select** the most appropriate **Reason** for **Termination** from the options list.
6. If in step 5, **Other Reason** is selected, **type** an appropriate **reason** for termination.
7. Once completed, **Click on Save and Close.**

Social Assistance Management System - [Assessment - AAAAging, TestGiver - 2/17/2011]

File Edit View Assessment Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts

New Call Call Log Search for Services

Agency Invoices Consumers AAAAging, TestGiver - Consumer Assessment - AAAAging, TestGiver - 2/17/2011

Close Assessment Edit Save Save and Close Print History Notes Properties

Previous Next Find Question Go to Narrative Choose Font Refresh

Assessment - AAAAging, TestGiver - 2/17/2011

- AAA Intake Form Rev
 - Universal Intake Form
 - 1. Client/Caregiver Information
 - Client Emergency Contact
 - Financial/Benefits
 - Referral Information
 - Screening Information
 - Care Recipient Information
 - Certification
 - Reason For Deactivation
 - Narrative

Reason For Deactivation	
Deactivation	
? N/A (Active)	Yes
What are the reasons for Termination?	
What is the other reason of the termination of the client's services?	

***Note – If the current Assessment does not contain a Deactivation section, then a reassessment must be processed for the sole purpose of being able to complete the Deactivation section. If an Assessment has never been completed, then one must be started for the sole purpose of being able to complete the Deactivation section.**

Part II – Terminating a Care Enrollment

Terminating a Care Enrollment is to be done only when one or more providers will remain active. It is **imperative** that providers Terminate only the Care Enrollment(s) directly related to their own service(s). **DO NOT TERMINATE CARE ENROLLMENT(S) FOR OTHER PROVIDERS.**

8. From within the Detail section, **Click on Care Enrollment**
9. Once the Care Enrollments are displayed, **select** the appropriate **Care Enrollment** to terminate.
10. **Click on Edit Care Enrollment.**

Social Assistance Management System - [AAAAging, TestGiver - Consumer]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Search New Call Call Log Search for Services

Service Contracts Consumers AAAAging, TestGiver - Consumer

Close Consumer Save Save and Close Print Consumer Print Preview Consumer Add Care Enrollment Edit Care Enrollment Deactivate Consumer

AAAAging, TestGiver 1394034975 06/05/1940 70 CM 10

AAAAging, TestGiver - Care Enrollments

Status	Status Date	Start Date	End Date	Care Program	Location
Active	07/01/2010	07/01/2010		Family Caregiver Support Program	Los Angeles
Active	07/01/2010	07/01/2010		III-B Supportive Services Program...	South Los Angeles
Active	07/01/2010	07/01/2010		Case Management	West Los Angeles
Active	07/01/2010	07/01/2010		Home Base Care(Federal)	Los Angeles
Active	07/01/2009	07/01/2009		Community Services (Not Enrolled)	West Los Angeles
Inactive	04/02/2008	04/02/2008	04/14/2008		West Los Angeles

Contents

- Summary
- Details
- Assessments
- Care Management
- Service Orders
- General
- Contacts
- Locations (2)
- Phones (1)
- User Fields (8)
- Ethnic Races (1)
- Care Enrollments (6)**
- Co-Pay
- Co-Pay Relations
- Care Managers (1)
- Fund Identifiers (4)
- Providers (3)

11. When the Edit Care Enrollment window appears, **fill in the Termination Date** with the appropriate date.
12. In the **Status** field, **select Terminated**.
13. **Select** the most appropriate termination **Reason**.
14. In the **End Date** field, **enter the same date** as entered in the Termination Date field.
15. **Click** on the **OK** button.

The screenshot shows a window titled "Add Care Enrollment" with a "Details:" section containing a table of enrollment information. Numbered callouts point to the following elements:

- 11: Termination Date field (08/01/2011)
- 12: Status field (Terminated)
- 13: Reason field (No Longer Desires Services)
- 14: End Date field (08/01/2011)
- 15: OK button

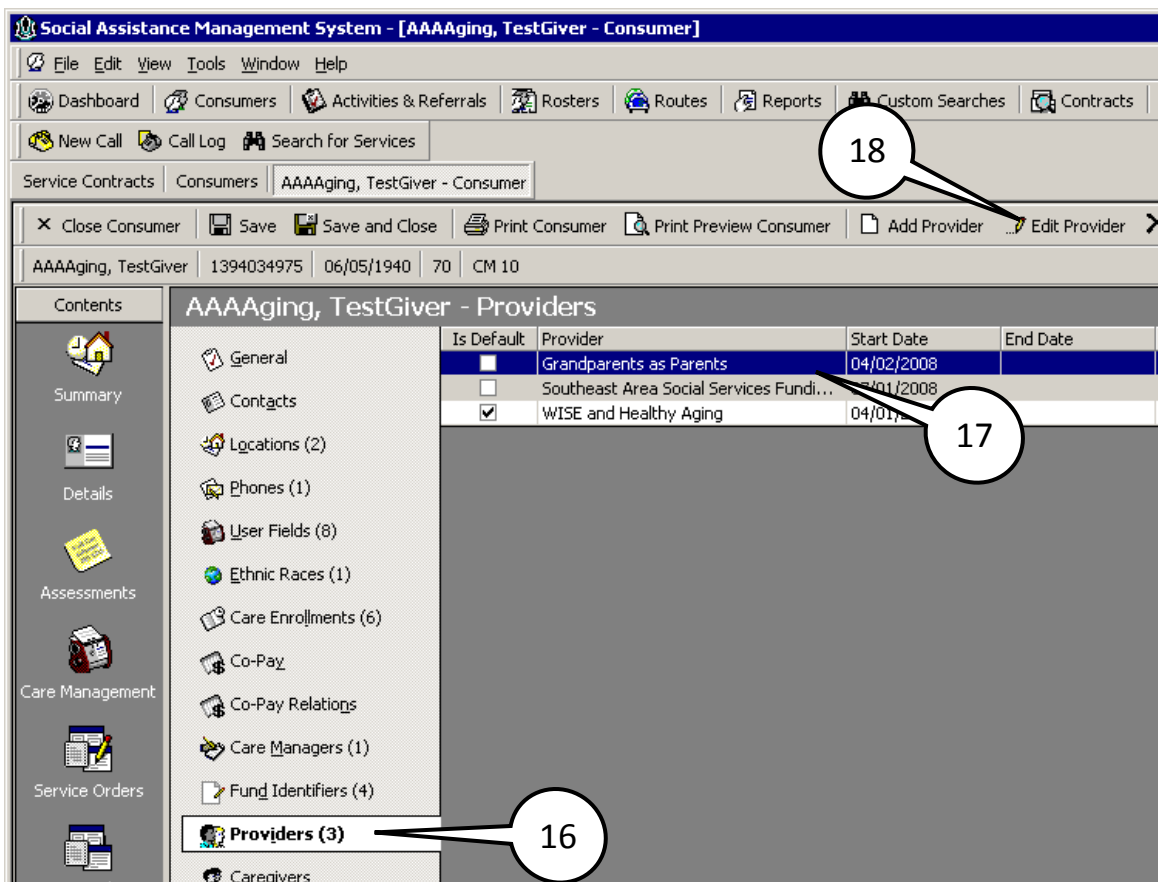
Details:	
Level of Care	Federal Administration on Aging Programs
Service Program	Family Caregiver Support Program - Title II
Care Program Name	Family Caregiver Support Program
Application Date	07/01/2010
Received Date	07/01/2010
Termination Date	08/01/2011
Status	Terminated
Reason	No Longer Desires Services
Status Date	07/01/2010
Start Date	07/01/2010
End Date	08/01/2011

Buttons on the right: OK, Cancel, Add Next

Part III – Inactivating a Provider, Fund Identifier, Care Recipient and/or Caregiver

The process for deactivating a Provider, Fund Identifier, Care Recipient and/or Caregiver is the same. All sections require only the entering of an End Date. It is **imperative** that providers enter the End Date only on components directly related to their own service(s). **DO NOT ENTER END DATES FOR OTHER PROVIDERS.** The example provided demonstrates how to deactivate a Provider.

16. From within the Detail section, **Click on Providers**
17. Once the Providers are displayed, **select the appropriate Provider** to deactivate.
18. **Click on Edit Provider.**



19. When the **Edit Consumer Provider** window appears, **fill in the End Date** with the appropriate date.
20. **Click on the OK button**

The screenshot shows the 'Edit Consumer Provider' window. The title bar is blue with the text 'Edit Consumer Provider' and a close button. Below the title bar is a 'Details' section containing a table with the following data:

Provider	Community and Senior Services
Default Provider	No
Start Date	04/02/2008
End Date	
First Service Date	06/06/2011
Last Service Date	06/13/2011
Info Release Authorized	No

Callout 19 points to the 'End Date' field, which is currently empty. Callout 20 points to the 'OK' button, which is located to the right of the table. Below the 'OK' button is a 'Cancel' button.

Part IV – Inactivating a Consumer

A consumer who has been deactivated can no longer receive services from any Los Angeles County provider(s).

21. From within the **Detail** section, **Click on Plus sign [+]** located in front of the **Status** heading.

The screenshot shows the Social Assistance Management System (SAMS) interface. The title bar reads "Social Assistance Management System - [AAAAging, TestGiver - Consumer]". The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for Dashboard, Consumers, Activities & Referrals, Rosters, Routes, Reports, Custom Searches, Contracts, Unit Distribution, and Invoices. Below the toolbar, there are buttons for New Call, Call Log, and Search for Services. The main content area is titled "Consumers AAAAging, TestGiver - Consumer". It includes a sub-menu with options like Close Consumer, Save, Save and Close, Print Consumer, and Print Preview Consumer. The main content area is divided into two sections: "Contents" on the left and "AAAAging, TestGiver - Details" on the right. The "Contents" section has a tree view with categories like Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, and Activities & Refer... The "Details" section is expanded, showing a list of categories: General, Contacts, Locations (2), Phones (1), User Fields (8), Ethnic Races (1), Care Enrollments (6), Co-Pay, Co-Pay Relations, Care Managers (1), Fund Identifiers (4), Providers (3), Caregivers, Care Recipients (2), and Service Sessions. A callout bubble with the number 21 points to the plus sign next to the Status heading in the left sidebar.

Personal	
Prefix	
First Name	TestGiver
MI	
Last Name	AAAAging
Suffix	
Maiden Name	O
AKA Name	Julio
Date Registered	04/02/2008
Consumer Details Last Reviewed	04/02/2008
Marital Status	Decline to state
Gender	
Declined to state Gender	Yes
Birth Date	06/05/1940
SSN	
Info Release Authorized	No
Default Agency	Los Angeles County AAA
Area Code	310
Home Phone	333-4444
Former IHSS Recipient?	No
Former ADHC recipient?	No
Residential Address	
Mailing Address	
NAPIS	
Status	
Insurance	
Other	
Characteristics	

22. Once the section expands, **change the Active field to No.**
23. **Select the most appropriate option for the Reason Field.**
24. Under **Status Date**, **enter the date the consumer was deactivated.**
25. Now that you are done, **Click on Save and Close.**

Social Assistance Management System - [AAAging, TestGiver - Consumer]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts Unit Distribution Invoices

New Call Call Log Search for Services

Consumers AAAging, TestGiver - Consumer

Close Consumer Save Save and Close Print Consumer Print Preview Consumer

AAAging, TestGiver 1394034975 06/05/1970 CM 10

Contents

- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery
- Activities & Referrals

AAAging, TestGiver - Details

General

First Name	TestGiver
MI	
Last Name	AAAging
Suffix	
Maiden Name	O
AKA Name	Julio
Date Registered	04/02/2008
Consumer Details Last Reviewed	04/02/2008
Marital Status	Decline to state
Gender	
Declined to state Gender	Yes
Birth Date	06/05/1940
SSN	
Info Release Authorized	No
Default Agency	Los Angeles County AAA
Area Code	310
Home Phone	333-4444
Former IHSS Recipient?	No
Former ADHC recipient?	No

Residential Address

Mailing Address

NAPIS

Status

Active	No
Reason	
Status Date	04/04/2011